



California Film & Television Tax Credit Program APPLICATION & INTERIM CHECKLIST

Important: Please carefully review guidelines regarding these requirements.

BEFORE PRODUCTION (Must be submitted no less than 30 days prior to principal photography)

- ☐ Application Form - CFC Form A (rev 10/20/2010) - hard copy
- ☐ Budget in an industry-standard budgeting program and PDF formats indicating only Qualified Expenditures - hard copy & electronic
- ☐ One-line Shooting Schedule for Feature/MOW; or Production Calendar for TV Series - hard copy & electronic
- ☐ Synopsis of the screenplay, teleplay or series - hard copy and electronic PDF or word document
- ☐ Screenplay - PDF electronic preferred; if not, 2 sided hard copy
- ☐ Supporting financial documentation evidencing at least 60% of the financing for the total production budget (e.g. bank or brokerage statements, commitment letters) - Paper copy & electronic PDF file
- ☐ Relocation Statement (if applicable) - hard copy

UPON APPROVAL

- ☐ Orientation Meeting for Accountant, Line Producer, UPM (min. of 2 representatives) no later than 4 weeks prior start of Principal Photography
- ☐ Monthly Status Report - CFC Form I (rev 9/1/2009)
(After initial report, may email CFC if no change in project status)

DURING PRODUCTION and/or POST PRODUCTION (via E-Mail)

- ☐ Call sheet on Day One of Principal Photography
- ☐ Final Production Reports (on a weekly basis)
- ☐ Monthly Status Report - CFC Form I (rev 9/1/2009)
(After initial report, may email CFC if no change in project status)
- ☐ Fiscal Year End Expenditure Report - if applicable - CFC Form K (rev 10/20/2010)



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CHECKLIST OF DOCUMENTS FOR OBTAINING TAX CREDIT CERTIFICATE

Please compile all paper documentation in a soft report cover with each section identified with tabs.

All electronic files must be submitted on a CD or USB flash drive.

- ☐ Expenditure Summary Report - CFC Form F (rev 01/10/2011) - original paper copy
- ☐ Certificate of Copyright Registration of the screenplay, teleplay or motion picture, television series or television movie - paper copy
- ☐ Post production facility letter or invoice evidencing completion of final elements - paper copy
- ☐ Verification of in-state work for visual effects, titles, post-sound, digital effects
- signed paper copies with vendor names, addresses, and phone numbers
- ☐ Cast and Crew Lists without phone numbers and home addresses; Vendor List - Electronic PDF file
- ☐ Main and end title final "checker" - electronic PDF file
- ☐ Agreed Upon Procedures (AUP) Report, including Exhibit A, prepared by independent, licensed CPA
- paper copy
- ☐ * Related party disclosure list - paper or electronic copy
- ☐ * Verification of accuracy of related party disclosure list - signed paper copy on letterhead
- ☐ * Assets comprised of office, post production, or effects equipment - paper copy
- ☐ * Assets over \$10,000 - paper copy
- ☐ 5 Production Stills - electronic digital files with cast approvals cleared for CFC usage
- ☐ End Credit Acknowledgement to THE STATE OF CALIFORNIA AND THE CALIFORNIA FILM COMMISSION
Optional: CFC Logo
- ☐ EPK (if available) - DVD or Flashdrive
- ☐ Local Community Expenditure Report, if overnight location occurs outside 30 mile zone - paper copy
- ☐ New Television Series Only: Documentation verifying initial distribution on basic cable - paper copy
- ☐ MOW Only: Documentation evidencing initial distribution on television, broadcast in one part - paper copy
- ☐ Miniseries Only: Documentation evidencing initial distribution on television of 2 or more episodes
and a total running time of at least 150 program minutes - paper copy

* Documents required for AUP also to be submitted to CFC.

Failure to provide the requested documentation may result in loss of the credit.

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